DOCUMENT RESUME

ED 344 290 EA 023 806

TITLE Qualitative Performance Indicators for School Effectiveness and School Improvement: The Scottish Experience.
INSTITUTION Scottish Office Education Dept., Edinburgh. HM Inspectors of Schools.
PUB DATE Jan 92
NOTE 18p.
PUB TYPE Reports - Evaluative/Feasibility (142)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Accountability; Educational Assessment; Elementary Secondary Education; *Evaluation Criteria; Foreign Countries; *Institutional Evaluation; Outcomes of Education; *Performance Factors; *School Effectiveness; *Self Evaluation (Groups)
IDENTIFIERS *Scotland

ABSTRACT

Outcomes of a collaborative project among policymakers, researchers, and practitioners in Scotland to develop a framework of qualitative performance indicators for school self-evaluation and development planning are described in this paper. Following an introduction, the second section presents an overview of the Scottish public education governance structure. The third section outlines efforts of Her Majesty's Inspectors of Schools to develop criteria for evaluating school effectiveness. The Qualitative Performance Indicators Project is described in the fourth section, with explanations of individual indicators at the primary and secondary levels. The program is not prescriptive, and schools are encouraged to adapt performance indicators appropriate to their situations. Included are a list of performance indicators and an outline of project purpose and content. (LMI)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED344290

QUALITATIVE PERFORMANCE INDICATORS FOR SCHOOL EFFECTIVENESS AND SCHOOL IMPROVEMENT: THE SCOTTISH EXPERIENCE

1. INTRODUCTION

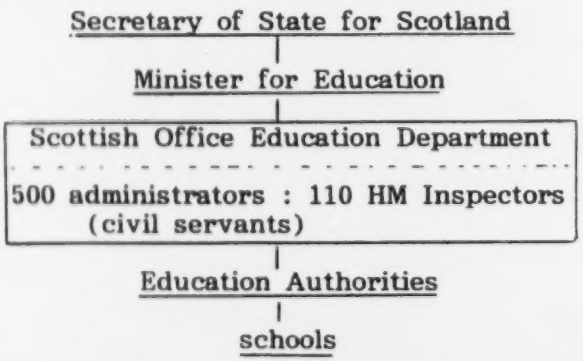
This paper is concerned with an aspect of national policy implementation. It reports on a major initiative in Scotland involving cooperation between policy makers and advisers, researchers and practitioners - the development and publication of a library of qualitative performance indicators for use by schools in self-evaluation and school development planning. Development planning has been identified by Her Majesty's Inspectors of Schools (HMI) as the vehicle by which schools can systematically evaluate key aspects of their work and manage their activities. Performance Indicators which illustrate different levels of performance are a vital management tool designed to enable schools to audit their current performance with w view to imroving quality and effectiveness.

2. BACKGROUND

The Secretary of State for Scotland, acting through an Education Minister and the Scottish Office Education Department (SOED) is responsible for the general supervision of the national education system. Public education in Scotland is a partnership between central and local government. The provision of education is one of the duties of the 11 Education Authorities (EAs). They are responsible for the construction of buildings; the employment of teachers and other staff; and the provision of equipment and materials. Their responsibility for the curriculum in schools is normally delegated by the EAs to individual headteachers.

The Scottish Office Education Department has oversight of all aspects of educational provisionand provides support grants to EAs to meet part of the cost of public education services. HM Inspectors of Schools (HMI) are part of the SOED and are appointed by HM the Queen on the recommendation of the Secretary of State. HMI are the principal professional advisers in education to the Secretary of State. They provide information, assessment and advice to Ministers, the SOED, other government departments and agencies and other central bodies involved in education. Their advice is also available to EAs, individual schools and colleges. They liaise closely with a wide range of educational bodies.

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
✓ This document has been reproduced as received from the person or organization originating it
☐ Minor changes have been made to improve reproduction quality
• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy



"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY
W. Clark
TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

EA 023 806

BEST COPY AVAILABLE

Three of the most important functions of HM Inspectors can be summarised as:

* **Evaluation and reporting** on the quality of education in schools, colleges and other educational institutions and organisations;

* **Development:** to give a lead to national developments in education, to identify cost effective ways of meeting the nation's educational needs and to collaborate with others to bring about necessary changes and improvements;

* **Contribution to policy formulation, assessment and advice.**

The work on the development of performance indicators and their use in school development planning makes a contribution to each of these three functions.

3. CRITERIA FOR SCHOOL EFFECTIVENESS

HMI work on developing criteria for school effectiveness has taken place over many years. The 110 HMI have worked to national guidelines in their inspections of schools and other educational establishments.
In 1989 they published "Effective Secondary Schools" in which they reported on the findings of HMI in their inspections over a number of years. The report described a range of features common to many schools considered to be effective and encouraged more evaluation of existing practice and performance. The expectation was that all schools could learn from the best practice already in evidence.

The report included chapters on:

- the need for evaluation
- effective learning and teaching
- pupil guidance
- school management: leadership and policies
- school management: structure and processes
- departmental management
- towards self-evaluation

The increasing emphasis on monitoring the quality of education over recent years has arisen from 3 sources: an awareness among schools and education authorities that they are accountable to the public for the education provided; increased concern by local and central government that the system should provide even better value for money; and the desire of individual EAs, schools and teachers to improve quality. The final chapter of the report stresses the importance of self-evaluation in seeking to improve current and future practice and performance. Self-evaluation demands clear procedures for finding out what the real problems and issues are. These are identified in the report as:

* on-going monitoring
* holding discussions to identify strengths and weaknesses
* determining staff development needs
* reviewing teaching methods
* sampling classroom experience
* analysing selected pupil work
* listening to the views of pupils, parents and other interested parties

* scrutinising results in national examinations
* using existing self-evaluation instruments

Self-evaluation should be conducted by:

* individual teachers
* departments and groups of teachers
* senior school management

The report concludes by commenting that in any external judgement of the effectiveness of a school in the future, one consideration will undoubtedly be whether it has effective mechanisms for evaluating its own performance on a continuing basis.

A similar report dealing with primary schools, "Effective Primary Schools", was published in 1990 and was followed in 1991 by "The Role of School Development Plans in Managing School Effectiveness". This third report highlighted school development planning as being an enabling mechanism which would assist schools to manage change. The educational system in Scotland, as elsewhere, has undergone a vast quantity and range of change during the past few years and schools and teachers require assistance in managing these changes. "The Role of School Development Plans etc." listed three principal ways in which HMI intended providing such assistance to enable schools to undertake school development planning:

* guidance for schools on a new approach to evaluating subject and school performance in national examinations through the use of two new types of analysis, relative ratings and national comparison factors;

* publication of the set of qualitative performance indicators developed by HMI and adapted for use by schools in school self-evaluation (the present project); and

* guidance on how the views of pupils, parents and teachers can be taken into account in school self-evaluation (the subject of the presentation by John MacBeath which follows this presentation).

4. THE QUALITATIVE PERFORMANCE INDICATORS PROJECT

i What is the project?

The project aimed to adapt the set of performance indicators developed by HMI over the preceding 4 years to make them suitable for schools in the self-evaluation process. Publication of the indicators themselves was not enough however since schools would need guidance in how to use them. HMI therefore commissioned a team of three educational researchers from colleges of education to write a support package for schools to accompany the PIs. This team worked in close liaison with HMI and trialled the materials and the PIs in a number of schools. There was discussion and refinement of the materials as a result of the input of schools, researchers and HMI and the PIs and support package were published towards the end of 1991.

ii What are the performance indicators?

The performance indicators cover KEY AREAS for audit. These are:

for primary schools:

Primary Class	Primary School
Key areas	Key areas
1.0 Quality of the Curriculum	1.0 Management of Accommodation and Resources
2.0 Quality of Learning and Teaching	2.0 Management of Staff
3.0 Pupil Progress and Attainment	3.0 Management : Planning
4.0 Classroom Management	4.0 Ethos
5.0 Background Factors.	

and for secondary schools:

Secondary Department	Secondary School
Key areas	Key areas
1.0 Quality of Courses	1.0 Management of Accommodation and Resources
2.0 Learning and Teaching	2.0 Management of Staff
3.0 Pupil Progress and Attainment	3.0 Management : Planning
4.0 Management of Accommodation and Resources	4.0 Ethos
5.0 Management of Staff	
6.0 Management: Planning	
7.0 Ethos	
8.0 Background Factors	

Each of these Key Areas is further broken down into a number of PERFORMANCE INDICATORS. Thus, for the Key Area "Quality of Learning and Teaching" there are 6 performance indicators. Two samples are included at the end of this paper.

2.0 **Learning and Teaching**

2.1 Quality of the Teaching Process
2.2 Quality of Pupils' Learning
2.3 Assessment as Part of Teaching
2.4 Meeting Pupils' Needs
2.5 Organisation and Use of Resources
2.6 Classroom Ethos

Each performance indicator contains a number of related themes, e.g. in the PI on "Quality of Pupils' Learning", the three themes are - motivation, opportunities to take responsibility for and be active in learning and to undertake independent thinking, and cooperation with others. A separate performance indicator could have been written for each of these observable aspects of pupils' learning, but had this been done throughout the set of indicators the resulting number would have been too large for schools to handle. Instead, a compromise has been sought between a relatively small number of indicators and instruments which are not as specific as they might have been. This requires those using the indicators to exercise professional judgement, but the benefit is that all will be basing that judgement on the same instrument. Views of effective or ineffective performance will be more objective than previously.

Each performance indicator is based on 4 possible levels of performance:

* MAJOR STRENGTHS - a very good performance
* STRENGTHS OUTWEIGH WEAKNESSES - some improvement desirable
* STRENGTHS OUTWEIGHED BY WEAKNESSES - significant improvement needed
* MAJOR WEAKNESSES - an unsatisfactory performance

Illustrations have been provided for only two of these levels, that of MAJOR STRENGTHS because this represents an attainable target for schools to try to achieve, and STRENGTHS OUTWEIGHED BY WEAKNESSES becauses this represents the level at which performance falls below what is considered acceptable. A performance between these two would be one in which strengths clearly outweigh and weaknesses. A performance characterised by major weaknesses would be clearly unsatisfactory.

The illustrations are not restrictive criteria. They are intended to illustrate what might be observed, hence the statement that a performance broadly equivalent to that illustrated would be considered to be at the same level. Again, there is room for professional judgement. One vitally important aspect of these indicators and their use is that those applying them and those having them applied to their performance must agree on thsir validity. This has to be established by discussion and debate at the outset, and may mean that an individual PI is adapted to suit the needs of the particular context.

Schools are now being encouraged to take these PIs, refine and adapt them, add to them as they see fit and perhaps discard some which they do not find to be appropriate. The set of PIs produced by HMI are being shared in the system in order to open up channels of communication at all levels and to try to establish a common language of education and, particularly, of quality in education. While some schools and EAs may choose not to use the set of PIs in its entirety they will know that these are the indicators which are being applied by HMI as external evaluators in their inspections. They would be foolish, therefore, to ignore them completely.

Early indications from trialling and from sharing the indicators with others in the educational system are that the value of havibg such a set of indicators is clearly recognised. The fact that they are not prescriptive is seen as positive and it is hoped that a continuing process of further refinement and development will occur over the next few years. The publication of this set of indicators, together with other quantitative indicators relating to exam results, attendance rates, costs, etc, is not the end of the story but an important chapter in taking forward the debate about quality, effectiveness and school improvement on a national scale.

THE SCOTTISH OFFICE
Education Department

Bill Clark
HM Inspector of Schools

Room 4/29
New St. Andrew's House Telephone 031-244 5134
Edinburgh EH1 3SY Fax 031-244 4785/6

PERFORMANCE INDICATORS

SECONDARY DEPARTMENT

1.0 Quality of Courses

2.0 Quality of Learning and Teaching

2.1 Quality of the Teaching Process
2.2 Quality of Pupils' Learning
2.3 Assessment as Part of Teaching
2.4 Meeting Pupils' Needs
2.5 Organisation and Use of Resources
2.6 Classroom Ethos

3.0 Pupil Progress and Attainment

3.1 Progress and Attainment in Coursework

4.0 Management of Accommodation and Resources

4.1 Use of Accommodation and Facilities
4.2 Provision, Organisation and Use of Departmental Resources

5.0 Management of Staff

5.1 Effectiveness of Head of Department
5.2 Deployment of Staff
5.3 Quality of Staff Development

6.0 Management: Planning

6.1 Aims and Policy Making
6.2 Curriculum
6.3 Learning and Teaching
6.4 Assessment and Recording
6.5 Monitoring and Evaluation
6.6 Planning for Development

7.0 Ethos

7.1 Departmental Ethos
7.2 Links with other Departments, Schools and Agencies

8.0 Background Factors

Note: These background factors refer to resources allocated to the Department by the senior management of the school.

8.1 Provision of Accommodation and Facilities
8.2 Provision of Resources
8.3 Provision of Staff

		Themes
1.0	**QUALITY OF COURSES**	
1.1	Quality of Courses at Each Stage	• breadth, balance and choice • continuity and integration of knowledge, understanding, skills and experience
2.0	**LEARNING AND TEACHING**	
2.1	Quality of the Teaching Process	• range and appropriateness of teaching approaches, including the use of homework • clarity and appropriateness of the teacher's exposition and explanations • quality of teacher-pupil dialogue
2.2	Quality of Pupils' Learning	• pupils are motivated by the learning experience • pupils have opportunities to take responsibility for, and be active in, their own learning and are encouraged to undertake indepdent thinking • pupils are encouraged to cooperate with others
2.3	Assessment as Part of Teaching	• appropriateness of assessment methods and evidence • quality of judgments made in the course of teaching of how well individual pupils are dealing with key learning aims and tasks • quality of feedback to pupils, including summaries of progress and achievement • use of assessment information in planning both learning and teaching.
2.4	Meeting Pupils' Needs	• choice of tasks, activities and resources to achieve appropriate targets for all pupils • relevance of the purposes and contexts of teaching to the pupils' experiences and interests
2.5	Organisation and Use of Classroom Resources	• organisation and accessibility • appropriate use of resources
2.6	Classroom Ethos	• classroom relationships • teachers' expectations of pupils' attitudes, learning habits and behaviour
3.0	**PUPIL PROGRESS AND ATTAINMENT**	
3.1	Progress and Attainment in Coursework	• pupils' progress towards appropriate curricular targets • pupils' attainment in relation to the course(s) being followed
4.0	**MANAGEMENT OF ACCOMMODATION AND RESOURCES**	
4.1	Use of Accommodation and Facilities	• use of available space • display and presentation of items of interest
4.2	Provision, Organisation and Use of Departmental Resources	• appropriateness of allocation of funds and provision of resources • organisation and accessibility • use of resources, including those available from sources outwith the department and the school
5.0	**MANAGEMENT OF STAFF**	
5.1	Effectiveness of Head of Department	• professional competence • leadership qualities • relationships with people and development of teamwork
5.2	Deployment of Staff	• appropriateness of remits/deployment of • promoted staff • teaching staff • ancillary staff
5.3	Quality of Staff Development	• identification and prioritisation of needs • effectiveness of departmental provision

BEST COPY AVAILABLE

		Themes
6.0	**MANAGEMENT: PLANNING**	
6.1	Aims and Policy Making	• appropriateness and range of the department's aims and policies • effectiveness of the procedures for formulating policies
6.2	Curriculum	• range of courses • communication of policy: advice and guidelines
6.3	Learning and Teaching	• quality of advice on approaches to learning and teaching • communication of the policy: advice and guidelines
6.4	Assessment and Recording	• quality of the policy on assessment and recording • communication of the policy: advice and guidelines • positive use of assessment information
6.5	Monitoring and Evaluation	• monitoring and evaluation of curriculum, learning, teaching and assessment • monitoring and evaluation of management of the department
6.6	Planning for Development	• planning a development programme aimed at improving the work of the department • implementation of the programme
7.0	**ETHOS**	
7.1	Departmental Ethos	• staff morale, relationships and teamwork; attitudes to learning and teaching and curriculum development • staff attitudes to pupils • contribution of the development of whole school ethos
7.2	Links with other Departments, Schools and Agencies	• links with other departments and staff within the school • links with other schools and agencies
8.0	**BACKGROUND FACTORS**	
8.1	Provision of Accommodation and Facilities	• sufficiency, range and appropriateness
8.2	Provision of Resources	• appropriateness of available finance • sufficiency, range and appropriateness of resources
8.3	Provision of Staff	• sufficiency and experience of staff • qualifications and expertise of staff

PERFORMANCE INDICATORS

SECONDARY SCHOOL

1.0 Management of Accommodation and Resources

1.1 Use of Accommodation and Facilities
1.2 Provision, Organisation and Use of Whole-School Resources

2.0 Management of Staff

2.1 Effectiveness of Headteacher
2.2 Effectiveness of Management Team
2.3 Deployment of Staff
2.4 Staff Development and Appraisal

3.0 Management: Planning

3.1 Aims and Policy Making at Each Stage
3.2 Curriculum at Each Stage
3.3 Learning and Teaching
3.4 Assessment and Recording
3.5 Reporting to Parents
3.6 Monitoring and Evaluation
3.7 Planning for Development

4.0 Ethos

4.1 Climate and Atmosphere
4.2 Inter-Departmental Cooperation
4.3 Partnership with Parents
4.4 Partnership with School Board
4.5 Links with other Schools and Agencies

		Themes
1.0	**MANAGEMENT OF ACCOMMODATION AND RESOURCES**	
1.1	Use of Accommodation and Facilities	• the use of available space • the display and presentation of items of interest
1.2	Provision, Organisation and Use of Whole School Resources	• appropriateness of allocation of funds and provision of resources • organisation and accessibility • use of resources, including those available from sources outwith the school
2.0	**MANAGEMENT OF STAFF**	
2.1	Effectiveness of Headteacher	• professional competence • leadership qualities • relationships with people and development of teamwork
2.2	Effectiveness of Management Team	• appropriateness of remits and deployments • individual effectiveness • corporate effectiveness
2.3	Deployment of Staff	• appropriateness of remits/deployment of senior teachers • appropriateness of equalisation duties • appropriateness of remits/deployment of Ancillary Staff
2.4	Staff Development and Appraisal	• identification and prioritisation of needs • effectiveness of school provision for staff development • effectiveness of school provision for staff appraisal
3.0	**MANAGEMENT: PLANNING**	
3.1	Aims and Policy Making	• appropriateness and range of the school's aims and policies • effectiveness of the procedures for formulating policies
3.2	Curriculum at Each Stage	• quality of the school's curriculum structure • the effectiveness of the timetable • communication of advice to pupils
3.3	Learning and Teaching	• quality of the policy on approaches to learning and teaching • communication of the policy: advice and guidelines
3.4	Assessment and Recording	• quality of the policy on assessment and its relationship to learning and teaching and national examinations • communication of the policy: advice and guidelines • positive use of assessment information
3.5	Reporting to Parents	• quality of procedures for communicating with parents. • quality of information given to parents about curriculum and assessment • quality of information given to parents about each pupil's progress
3.6	Monitoring and Evaluation	• monitoring and evaluation of curriculum, learning, teaching and assessment • monitoring and evaluation of the management of the school
3.7	Planning for Development	• planning a development programme aimed at improving the work of the school • implementation of the programme

BEST COPY AVAILABLE

		Themes
4.0	**ETHOS**	
4.1	Climate and Atmosphere	• sense of community in the school; staff-pupil relationships; the caring climate and the reception of visitors • pupil behaviour and discipline • management's role in promoting a positive school climate and atmosphere
4.2	Inter-departmental Cooperation	• appropriateness • effectiveness
4.3	Partnership with Parents	• encouragement to parents to be involved in the process of learning and the life of the school • responsiveness of the school to parents' views and enquiries
4.4	Partnership with School Board	• range and appropriateness of contacts • effectiveness of liaison
4.5	Links with Other Schools and Agencies	• range and appropriateness of contacts • effectiveness of liaison

Secondary	Department	Ref No SD2.2
Learning and Teaching	**Quality of Pupils' Learning**	

This performance indicator is concerned with the following themes:

the extent to which -

- **pupils are motivated by the learning experience;**
- **pupils have opportunities to take responsibility for, and be active in, their own learning and are encouraged to undertake independent thinking; and**
- **pupils are encouraged to co-operate with others.**

Level	Illustration
Major Strengths	• **A learning environment which encourages pupils to produce work of high quality has been established. Praise is regularly used to motivate pupils. Pupils work well and enthusiastically without close supervision.** • **The planned framework for learning includes opportunities for pupils to take responsibility for, and be active in, their own learning. Pupils are frequently required to think for themselves and reflect on ideas, issues and experiences.** • **Pupils are encouraged to work collaboratively in a variety of circumstances involving groups of different composition and size.** **A performance broadly equivalent to that illustrated above would be considered as having major strengths - a very good performance.**
Strengths outweighed by weaknesses	• **Pupils respond conscientiously to the tasks set by the teacher, but the work of the class is characterised by a lack of enthusiasm and pupils have few opportunities to exercise initiative. Some steps are taken to encourage good work and improve motivation but these are not maintained.** • **Pupils have few opportunities to take responsibility for, and be active in, their own learning and do not always work well in the absence of direct supervision. They do what the teacher asks them to do but in many cases they are passive listeners or watchers or undertake tasks which do not require much thought.** • **Pupils have few opportunities to work collaboratively or have opportunities which lack variety in terms of composition and size of groups.** **A performance broadly equivalent to that illustrated above would be considered as one in which strengths are outweighed by weaknesses - significant improvements are needed.**

Notes

1. **This performance indicator should be applied separately to each stage: S1/S2, S3/S4 and S5/S6.**

Secondary	Department	Ref No SD2.3
Learning and Teaching	**Assessment as Part of Teaching**	

This performance indicator is concerned with the following themes:

- **appropriateness of assessment methods and evidence;**
- **quality of judgements made in the course of teaching of how well individual pupils are dealing with key learning aims and tasks;**
- **quality of feedback to pupils, including summaries of progress and achievement; and**
- **use of assessment information in planning both learning and teaching.**

Level	Illustration
Major Strengths	• **Methods of assessment are well matched to clearly identified purposes, including preparation for national examinations. An appropriate range of approaches to assessment, formal and informal, is employed in making judgements about progress towards curricular targets and there is an effective means of recording assessment information.** • **Teachers are knowledgeable about the pupils and constantly seek to find out how they are dealing with tasks, what difficulties they are meeting and how successful they are.** • **Information as to progress and attainment is regularly transmitted by the teacher to pupils. Pupils themselves are involved in dialogue about their progress and their views are valued. A strong emphasis is placed on valuing individual achievement and identifying next steps in learning. Summaries and records are used periodically to inform pupils.** • **Good use is made of assessment information when evaluating the effectiveness of learning and teaching. Plans indicate that account has been taken of assessments made and, where appropriate, they have been modified as a result.** **A performance broadly equivalent to that illustrated above would be considered as having major strengths - a very good performance.**
Strengths outweighed by weaknesses	• **The purposes of assessment are narrow and not always clear. Only a limited range of assessment procedures is employed and these are sometimes inappropriate for assessing progress towards curricular targets. Recording of the assessment information occurs but may be inadequate or not as helpful as possible.** • **The teacher's knowledge of the pupils is uneven. Key strengths and weaknesses may sometimes be overlooked and 'on the spot' judgements may be superficial.** • **Feedback to pupils is irregular and pupils only occasionally discuss their progress with the teacher. Such feedback as is provided takes insufficient account of the need to acknowledge achievement or to identify next steps in learning. Some records are kept but they may not cover all key aspects of performance and are not often used to inform pupils.** • **Not enough use is made of assessment information to evaluate the effectiveness of learning and teaching. There is little evidence of such information being regularly used to inform future provision for learning and teaching.** **A performance broadly equivalent to that illustrated above would be considered as one in which strengths are outweighed by weaknesses - significant improvements are needed.**

Notes

1. **This performance indicator should be applied separately to each stage: S1/S2, S3/S4 and S5/S6.**

BEST COPY AVAILABLE

SCHOOL SELF-EVALUATION AND THE USSE OF PERFORMANCE INDICATORS AN SOED DEVELOPMENT PROJECT 1990-91

PROJECT GROUP

Bill Clark HMI
Ian Knowles, Moray House College of Education
Mary Quinn, St.Andrew's College of Education
Reg Wilson, St.Andrew's College of Education, Project Leader.

The group worked between August 1990 and July 1991

CONTEXT OF THE PROJECT

The project is a development in the movement for 'school effectiveness' and for 'quality assurance': it should be seen as having close links with other recent initiatives and publications, in particular:

Effective Secondary Schools, SED, 1988;

Effective Primary Schools, SED, 1989;

Management Training for Headteachers Modules, especially Module 6, Monitoring School Effectiveness, 1990;

The Role of School Development Plans in Managing School Effectiveness, SOED, 1991

PURPOSE OF THE PROJECT

To provide a package of materials which will introduce headteachers of primary and secondary schools and their staff to a range of strategies and techniques by which they can undertake a school audit as part of a programme of school self-evaluation, including the use of performance indicators. The package will support the introduction of the series of performance indicators developed in recent years by HM Inspectorate.

After working through the package, headteachers and their staff will be able to:

- recognise the purpose of a school audit;
- plan an audit for their own school;
- identify the ways in which a series of performance indicators can inform a school audit;
- understand the nature and function of performance indicators;
- identify different forms of audit;
- produce a school audit report;
- recognise the progression from school audit to a school development plan.

PRODUCING THE MATERIALS, AUGUST 1990 TO JULY 1991

August to December 1991: planning, preparation.

December 1990–March 1991: writing units, reading by ADES representatives

April to May 1991: trialling materials in schools after liaison with ADES project group. Trialling as follows:

Primary materials: 4 schools in Fife
4 schools in Strathclyde.

Secondary materials: 1 school in Fife
2 schools in Strathclyde.

May to June 1991: redrafting.

CONTENT

The package acts as a training guide for headteachers and their staff providing information, activities and reviews. There are two versions, primary and secondary. Each is divided into sections as follows:

Introduction

A framework for school self-evaluation following the APIE model,

- Audit
- Planning
- Implementation
- Evaluation

1. The purpose of the audit

Consideration of the right climate in which to start an audit. What an audit can and cannot do.

2. Establishing a framework for audit

Setting up the audit. Introduction to performance indicators, in particular qualitative PIs, and how they can be used in an audit. Working through the structure of HMI's PIs.

3. Carrying out an audit

Procedures for different schools: gathering evidence, collating and using it.

4. Producing an audit report

What an audit report looks like.
Case studies, primary and secondary.

5. From audit to development

Brief consideration of the move from audit to development within the framework of a school development plan.

Resources

Overhead Transparency copy pages.

Each version, primary and secondary, is accompanied by the appropriate series of HMI's performance indicators.